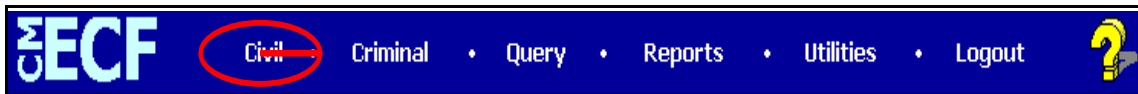


# CM/ECF CIVIL AMENDED COMPLAINT ATTORNEY TRAINING

## **Docketing an Amended Complaint in a Civil Case**

1. Log in to CM/ECF. Locate the **CM/ECF Main Menu Bar** at the top of the screen. Click on the **Civil** option on the **CM/ECF Main Menu Bar** (see Figure 1).



**Figure 1 - CM/ECF Main Menu bar**

2. The system will display the **Civil Events** screen. Click on **Complaints and Other Initiating Documents** in the Initial Pleadings and Service section (see Figure 2).



**Figure 2 - Civil Events screen**

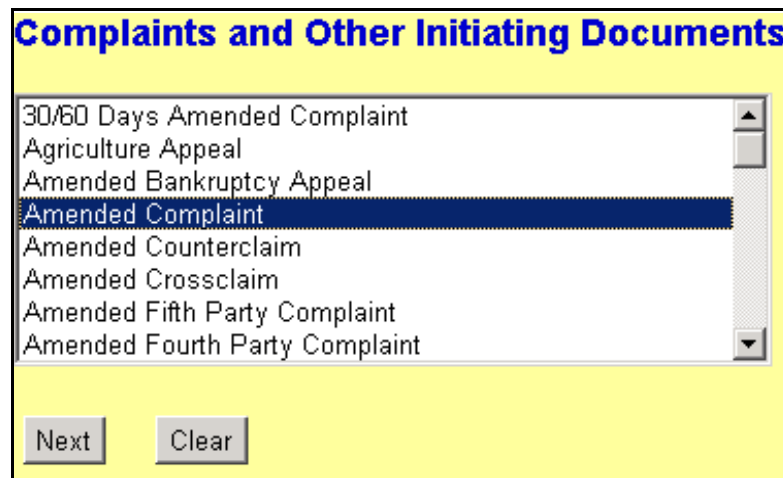
# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### **Docketing an Amended Complaint in a Civil Case**

3. The system will display the **Complaints and Other Initiating Documents** selection screen.
  - a. The system will display a list of various types of complaints and initiating documents. Click on the down-arrow or scroll down to select **Amended Complaint** from the list. Click on the words **Amended Complaint**. Once the **Amended Complaint** event appears highlighted, click on the **[ Next ]** button to continue (see Figure 3).



**Figure 3 - Complaints and Other Initiating Documents Selection screen**

4. The system will display the **Case Number** screen. Enter the case number in the **Case Number** box, using one of the formats displayed. For example: **99-12345**, **1:99-cv-12345**, **1-99-cv-12345**, **99cv12345** or **1:99cv12345**. Click the **[ Next ]** button to continue (see Figure 4).

# CM/ECF CIVIL AMENDED COMPLAINT ATTORNEY TRAINING

## **Docketing an Amended Complaint in a Civil Case**

Case Number

01-4231 99-12345, 1:99-cv-12345, 1-99-cv-12345, 99cv12345, or 1:99cv12345

Next Clear

**Figure 4 - Case Number screen**

- a. If the case number entered is **not** a valid case number, the system will display the following message:

**1:yy-cv-nnnnn is not a valid case. Please enter a valid value.**

Click the [ **Back** ] button. The system will return you to the **Case Number** screen. Enter a valid case number, using one of the formats outlined in Step 4.

5. The system will display the **Case Number Verification** screen (see Figure 5). The purpose of the **Case Number Verification** screen is for you to verify the case number entered in Step 4.

9:01-cv-04231 Schwarzkopf v. Smith

Next Clear

**Figure 5 - Case Number Verification screen**

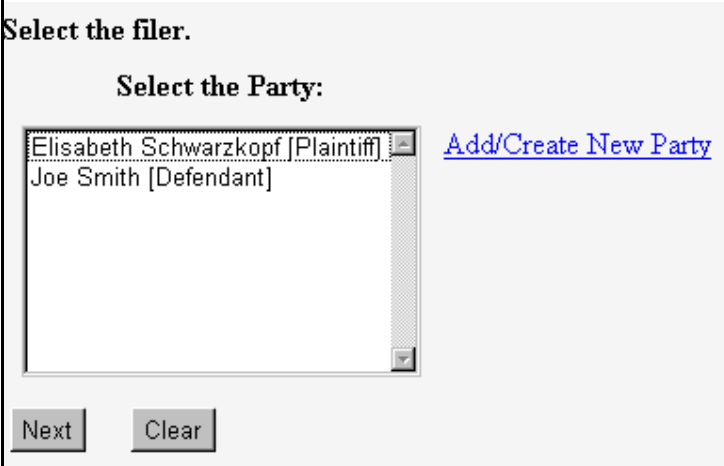
# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### **Docketing an Amended Complaint in a Civil Case**

- a. If this is the correct case, click the **[Next]** button.
  - b. If this is **not** the correct case, you **must** return to the **Case Number** screen in Step 4. To return to the **Case Number** screen, click the **Back** button of your browser until you reach the **Case Number** screen (see Figure 4 in Step 4). Once you reach the **Case Number** screen, repeat Steps 4 and 5.
6. The system will display the **Party Selection** screen (see Figure 6).



Select the filer.

Select the Party:

Elisabeth Schwarzkopf [Plaintiff]  
Joe Smith [Defendant]

[Add/Create New Party](#)

Next Clear

**Figure 6 - Party Selection screen**

- a. A list of the parties in the case will be displayed for you to select the party(ies) who is filing the amended complaint. To select the party(ies) who is filing the amended complaint, click on that party's name to highlight it, then click the **[Next]** button.
- b. If the party's name is **not** on the list, i.e., the amended complaint is adding plaintiffs to the case, click the [Add/Create New Party](#) hyperlink. Please refer to the **U.S.D.C. Southern District of New York's Standardized Procedures for Creating New Party Information in CM/ECF**. After you have added/created new party information return to the **Party Selection** screen. Select the party(ies) who are filing the amended complaint, click on the party's name to highlight it, then click the **[Next]** button.

# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### **Docketing an Amended Complaint in a Civil Case**

**NOTE:** If more than one party is filing the amended complaint, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who are filing the amended complaint are selected.

7. The system will display the **Party Selection** screen again (see Figure 7).

Please select the party that this filing is **against**.

**Select the Party:**      **OR**      **Select a Group:**

Elisabeth Schwarzkopf [Plaintiff]  
Joe Smith [Defendant]

[Add/Create New Party](#)

☒ No Group  
☐ All Defendants  
☐ All Plaintiffs  
☐ All Parties

**Next**      **Clear**

**Figure 7 - Party Selection screen for the party this filing is against**

- a. A list of the parties in the case will be displayed for you to select the party(ies) who amended complaint is **against**. To select the party(ies) who the amended complaint is **against**, click on that party's name to highlight it, then click the **[Next]** button.
- b. If the party's name is **not** on the list, i.e., the amended complaint is adding defendants to the case, click the [Add/Create New Party](#) hyperlink. Please refer to the **U.S.D.C. Southern District of New York's Standardized Procedures for Creating New Party Information in CM/ECF**. After you have added/created new party information return to the **Party Selection** screen. Select the party(ies) who the amended complaint is **against**, click on the party's name to highlight it, then click the **[Next]** button.

# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### **Docketing an Amended Complaint in a Civil Case**

**NOTE:** If the amended complaint is **against** more than one party, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who the amended complaint is **against** are selected.

**NOTE: DO NOT** click on any of the radio buttons listed under the **Select a Group:** list, because the docket text will reflect that the amended complaint was against "all defendants". The user must select the parties listed under the **Select a Party:** pick list, because the docket text must reflect the actual names of the party(ies) who the amended complaint is against.

8. The system will display the following message:

**GO BACK!!!**

**ADD any additional plaintiff(s) before SELECTING plaintiff(s) on the select filer screen.**

**ADD any additional defendant(s) before SELECTING defendant(s) on the select against screen.**

**Read this message carefully!** This message is to remind you, if you haven't already done so in the previous steps, to add additional parties to the system if the amended complaint is adding parties to the case. If more parties need to be added to the case, click the **Back** button of your browser to return to the **Party Selection** screens, then click the [Add/Create New Party](#) hyperlink. Once you are certain all parties have been added and selected as needed, click the **[Next]** button to continue.

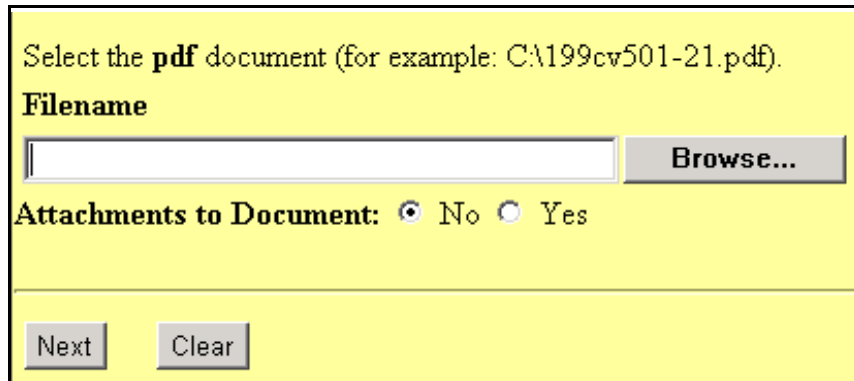
# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### **Docketing an Amended Complaint in a Civil Case**

9. The system will display the **pdf document** screen. The **pdf document** screen is used to associate a PDF file/document with the docket entry being docketed (see Figure 9).



**Figure 9 - PDF Document Screen**

- a. To associate a PDF Document with this docket entry, and if the PDF Document has any attachments, click the **[ Browse... ]** button and refer to the **Procedures For Uploading a PDF Document and Attaching an Attachment in CM/ECF**. After attaching the PDF Document, click the **[ Next ]** button to continue.
10. The system will display the following message:

**Current Jury Demand value is highlighted on a subsequent screen.**

**If the highlighted value is correct, do NOT change it.**

**+ If ONLY PLAINTIFF has demanded jury, value should be p (Plaintiff)**

**+ If ONLY DEFENDANT has demanded jury, value should be d (Defendant)**

**+ If BOTH sides have demanded jury, value should be b (Both)**

**Read this message carefully, then click the [Next] button to continue.**

# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### Docketing an Amended Complaint in a Civil Case

11. The system will display the **Update Jury Demand** screen (see Figure 11a).

a. The current jury demand value in the case will automatically be highlighted in the **Jury Demand** pick list. If the highlighted value is correct, do not change it. Click the **[ Next ]** button to continue.

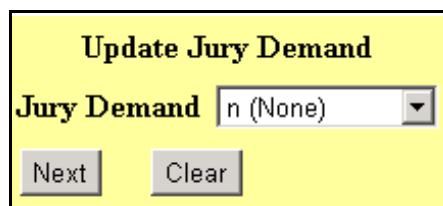
The screenshot shows a yellow rectangular box titled "Update Jury Demand". Inside, there is a label "Jury Demand" followed by a dropdown menu currently showing "n (None)". Below the dropdown are two buttons: "Next" and "Clear".

Figure 11a - Update Jury Demand screen

b. If the current jury demand value is **not** correct and need to be changed, click the down-arrow on the **Jury Demand** pick list, and select the correct value; **b (Both)**, **d (Defendant)**, **n (None)**, or **p (Plaintiff)**. (See Figure 8b). Click the **[Next]** button to continue.

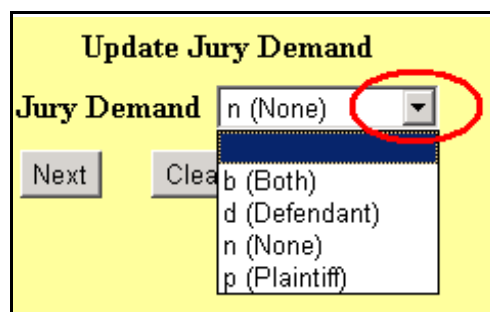
The screenshot shows the same "Update Jury Demand" screen as Figure 11a, but the dropdown menu is open, showing a list of options: "b (Both)", "d (Defendant)", "n (None)", and "p (Plaintiff)". A red circle highlights the dropdown arrow button.

Figure 11b - Update Jury Demand selection

12. The system will display the **Complaint Selection** screen (see Figure 12).

Include	Date	#	Docket Text
<input type="checkbox"/>	10/01/2001	<u>1</u>	COMPLAINT against Joe Smith (Filing fee \$ 150.), filed by Elisabeth Schwarzkopf. (Ledford, Kerry) (Entered: 10/22/2001)

Next Clear

Figure 12 - Complaint selection screen

a. A list of all the complaints in the case will be displayed. To select a complaint, click in the check box at the far left of the **Complaint Selection** screen next to the complaint. When you have checked the correct complaint, click the **[Next]** button to continue.



# CM/ECF

## CIVIL AMENDED COMPLAINT

### ATTORNEY TRAINING

#### Docketing an Amended Complaint in a Civil Case

**NOTE:** If the document number of the complaint is underlined and highlighted in blue, it means that there is a pdf document associated with the complaint. To view the pdf document associated with that complaint, click on the document number nn. The system will then take you to the **PACER Login** screen. Enter your **PACER Login** and **Password**. View the document. To return to the **Complaint Selection** screen, Log out of PACER.

13. The system will display the **Modify Docket Text** screen (see Figure 13).

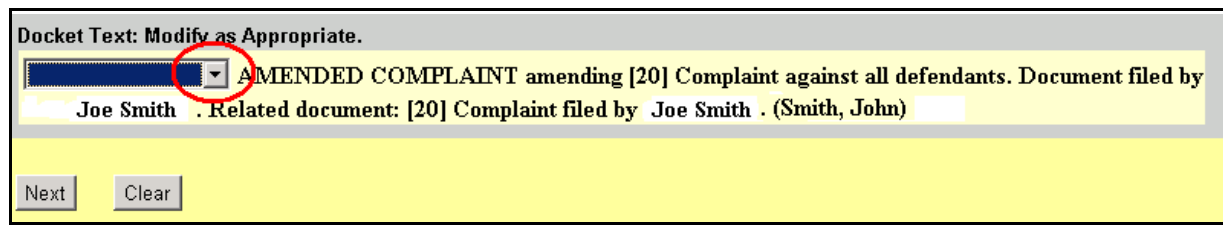


Figure 13 - Modify Docket Text screen

- a. If the amended complaint has a document prefix (e.g., **First**, **Second**, **Amended**, **Third**, etc.), then click on the down arrow next to the first box. Highlight the prefix and click on the prefix to select it. If the amended complaint does **not** have a document prefix, then leave the first box blank.
  - b. Thoroughly check the docket text for accuracy. Make sure that it reflects the correct complaint(s) and filer(s). If it does **not**, click your browser's **Back** button to correct any error.
  - c. Click the **[Next]** button to continue.
14. The system will display the **Docket Text: Final Text** screen. The system will display the following message:

**Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.**

# CM/ECF CIVIL AMENDED COMPLAINT ATTORNEY TRAINING

## **Docketing an Amended Complaint in a Civil Case**

**NOTE: CHECK THE DOCKET TEXT CAREFULLY HERE. THIS IS THE LAST CHANCE FOR YOU TO GO BACK AND CORRECT ANY ERRORS IN THE TRANSACTION OR TO LEAVE THE TRANSACTION AND START OVER BY CLICKING THE CIVIL OPTION ON THE CM/ECF MAIN MENU BAR.**

When you click the [ **Next** ] button on this screen, you are submitting this transaction to the CM/ECF database. If there is a mistake in the transaction, you will **not** be able to click the **Back** button of your browser to make any corrections.

If you are completely satisfied with the transaction, click the [ **Next** ] button to complete the docketing of this transaction.

15. The system will display the **Notice of Electronic Filing** screen (see Figure 15). The **Notice of Electronic Filing** screen is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.
  - a. To print a copy of this notice, click the browser **Print** icon.
  - b. To save a copy of this receipt, click the **File** option on the browser menu.

**NOTE:** When you arrive at the **Notice of Electronic Filing** screen, you are finished with the filing/docketing of your transaction. You can select a choice from the **CM/ECF Main Menu Bar** at the top of the screen. For example, you can click on **Civil** or **Criminal** to file/docket another transaction.

**CM/ECF**  
**CIVIL AMENDED COMPLAINT**  
**ATTORNEY TRAINING**

**Docketing an Amended Complaint in a Civil Case**

Notice of Electronic Filing

The following transaction was received from Leslie LeFord on 10/29/2001 at 2:42 PM CST

**Case Name:** Schwarzkopf v. Smith

**Case Number:** [0-01-04231-RB](#)

**Document Number:** [19](#)

**Docket Text:**

MOTION to Continue by Joe Smith. (Ledford, Kerry)

The following document(s) are associated with this transaction:

**Document description:**Main Document

**Original filename:**R:/TRAINING/ECF/Docs\_PDF/ECFdocs/Motion.PDF

**Electronic document Stamp:**

[STAMP dcstdStamp\_ID=981407491 [Date=10/29/2001] [FileNumber=50855-0]  
[3f9f4f49836ae59be00306477b777c2dbc6dc6f8b64b9530ad63962089ccd394dc735  
12a16b3c4e11ef754e17e46a53ccdc5d5eb14d5f549179dbc3da4ad03a7]]

**0-01-04231-RB Notice will be electronically mailed to:**

**0-01-04231-RB Notice will not be electronically mailed to:**

Dale P. Jones  
Jones and Associates  
129 Main Street  
San Antonio, TX 78209

Leslie LeFord  
Courthouse Steps  
271 Main Plaza  
San Antonio, TX 78201

**Figure 15 - Notice of Electronic Filing screen**